

Integrating Appian with Salesforce

Many customers who use Appian for its strong intelligent automation capabilities also rely on Salesforce to create a complete customer management solution. Appian maximizes your Salesforce investments as advanced case management, delivery speed, and architectural reuse become more imperative.



Build this, not that.

Consider integrating Appian with Salesforce when you need:

- **Automation.** Expand salesforce solutions by leveraging capabilities like leading process, Artificial intelligence (AI), and Robotic Process Automation (RPA).
- **Case Management.** Extend the customer experience with streamlined case management and BPM.
- **Consolidation.** Utilize Appian Records to unify and extract pertinent data from Salesforce and other systems.

Avoid solutions that:

- **Pave the cow path.** Before recreating the same UI or process, consider better alternatives.
- **Already have mature alternatives.** You purchased Salesforce for a reason. So leverage its core CRM capabilities when you need them.

Under the hood:

Some of the key highlights that support Salesforce are:

- Two Connected System templates: Web Server OAuth and Username/Password OAuth
- Full CRUD SObject support
- Guided and custom SOQL entry support
- Custom SOSL entry support
- Guided integration design experience (no need to reference SF Docs)
- Built-in HTTP Request/Response details for easier troubleshooting
- Templates that call Appian process and data and empower you to build your own APIs in minutes

Keys to effortless Salesforce integration:

Appian makes connecting to Salesforce easy with two features: **The connected system and Web API framework.**

Connect to Salesforce, or any system in your enterprise, in minutes instead of hours or days. Appian's no-code Connected System for Salesforce guides you through important connection details and lets you test a successful, secure connection before building any HTTP requests.

Once you connect Appian to Salesforce, you can create integrations without ever touching a line of code. Choose operations from an easy-to-use guided integration designer or write your own SOQL Query/SOSL Search. With built-in testing tools, connecting to Salesforce has never been easier.

You can even call Appian from Salesforce. In minutes, create a custom Web API that can connect to any process, any Appian data, and more. You'll have full end-to-end integration with your enterprise systems with a modern, secure, easy-to-use set of tools.

How our customers use Appian with Salesforce:



Aegon is a global leader in life insurance, pensions, and asset management. Like many companies, Aegon stores customer data in Salesforce. However, they were hindered by slow, manual processes, including duplicate entry into Salesforce and other systems.

Aegon used Appian to automate processes and unify customer data across disparate systems. Such automation could have been time-consuming (and costly) for a company in a highly regulated industry. But using Appian, Aegon was able to connect its pensions systems in just 2.5 months.



Appian provides a low-code automation platform that accelerates the creation of high-impact business applications. Many of the world's largest organizations use Appian applications to improve customer experience, achieve operational excellence, and simplify global risk management and compliance.

For more information, visit appian.com